

## Job Aid: How to Create an RPA Release Requisition

### This Job Aid Shows How To:

- Create an RPA Release Requisition in COMMBUYS
- Convert an RPA Release Requisition to a Release Purchase Order

### Of Special Note:

A Request for Payment Authorization (RPA) Release is a document in COMMBUYS used to enter a contract purchase that has taken place. Once approved, the RPA Release Requisition creates a Release purchase order (PO) associated with a Master Blanket Purchase Order (MBPO) which is a COMMBUYS document used to create ordering catalogs for contracts, including Statewide Contracts (SWCs).

To use this functionality, the MBPO must be built as an RPA Release-Enabled contract. Before beginning the requisition, access the MBPO's General tab and verify that the RPA Release Enabled field displays a "Yes".

### Screenshot



### Directions

#### Step 1: Log-in to COMMBUYS

1. Launch the COMMBUYS website by entering the URL (<https://www.commbuys.com>) in the browser or by clicking on the hyperlink [COMMBUYS](https://www.commbuys.com).
2. Click on the orange **Sign In** button in the upper right hand corner.

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### Screenshot

### Directions

#### Step 2: Logging In

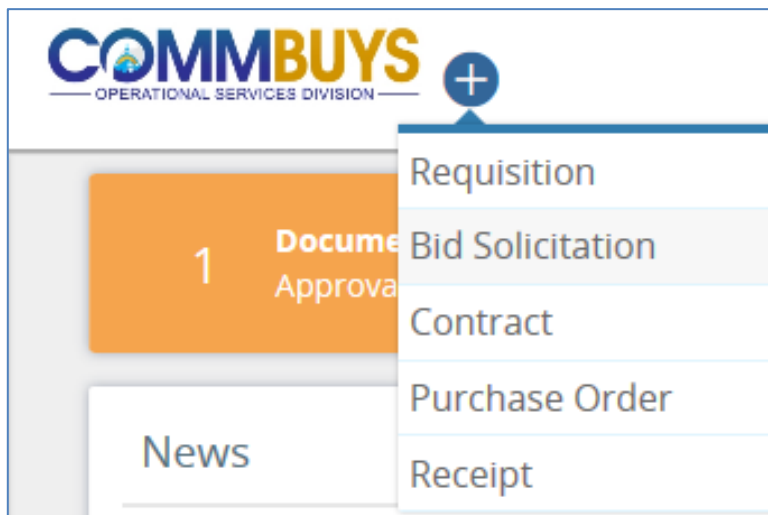
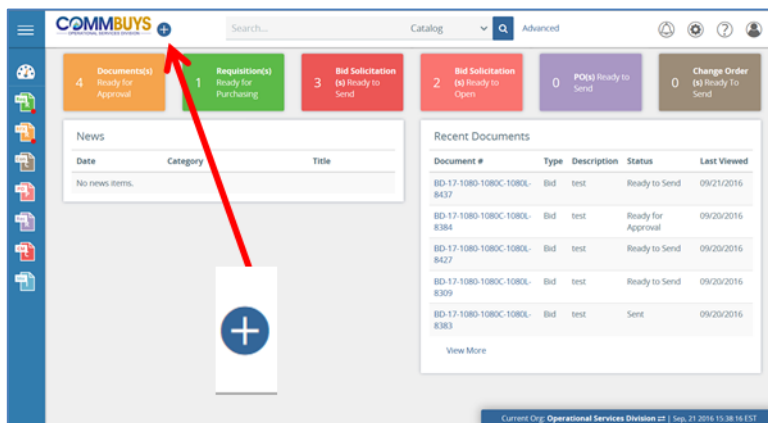
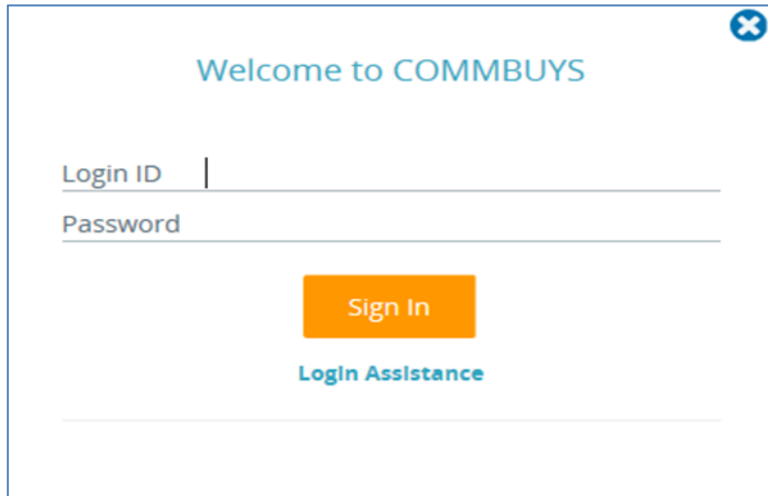
1. Enter your **Login ID** and **Password**.
2. Click on the **Sign In** button.

#### Step 3: Creating a New Document

Click on the **Add Documents** (plus sign) icon.

#### Step 4: Selecting Requisition

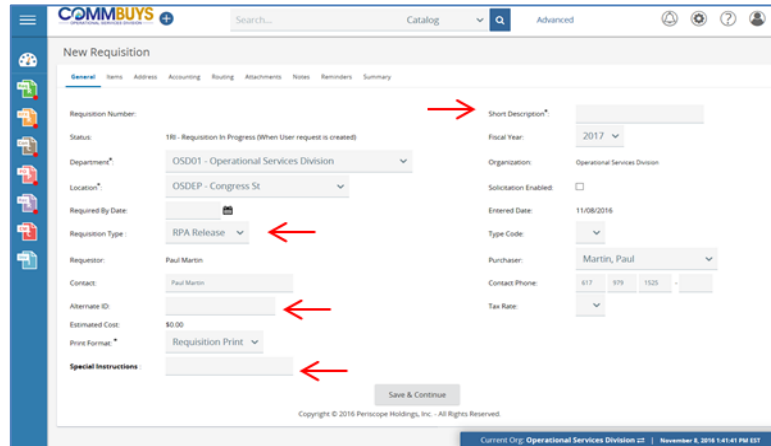
Select **Requisition** from the dropdown menu.



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### Directions



The screenshot shows the 'New Requisition' form in the COMMBUY'S system. The 'General' tab is active. Fields with asterisks (\*) indicate required fields. Red arrows highlight the following fields: 'Short Description\*', 'Requisition Type' (set to 'RPA Release'), 'Alternate ID', and 'Special Instructions'. The 'Save & Continue' button is at the bottom right.

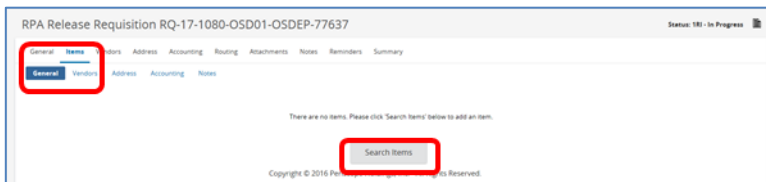
#### Step 5: Entering Data in the General Tab

The **General** tab page displays. Fields with asterisks are required fields. The required fields for **Department**, **Location**, and **Print Format** default to values that may be changed if needed.

1. In the required **Short Description** field enter a searchable description of the desired goods or services.
2. Click on the dropdown arrow next to the **Requisition Type** field and select **RPA Release** (do NOT select RPA).
3. **Alternate ID**: Enter information as required. This may include (but not limited to) data such as MMARS encumbrance ID or ERP/Accounting system transaction numbers for non-MMARS users.
4. **Special Instructions**: Enter information as required. This field normally allows for entry of specific instructions to vendors. If entered on the requisition, the data in this field will copy forward to the PO and also be visible on the print version of the PO. Since this PO will not be sent to the vendor, it may be used for additional information about this RPA.
5. When you are finished, click on the **Save and Continue** button.

#### Step 6: Searching for Items

1. Click on the **Items** tab.
2. Click on the **Search Items** button.



The screenshot shows the 'RPA Release Requisition RQ-17-1080-OSD01-OSDEP-77637' page. The 'Items' tab is selected. The 'Search Items' button is highlighted with a red box. The page displays a message: 'There are no items. Please click "Search Items" below to add an item.'

## Job Aid: How to Create an RPA Release Requisition

### Screenshot

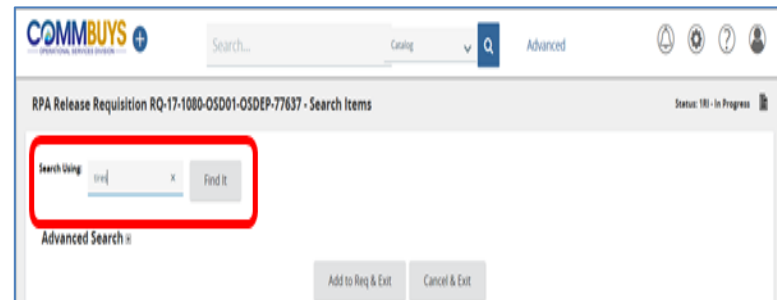
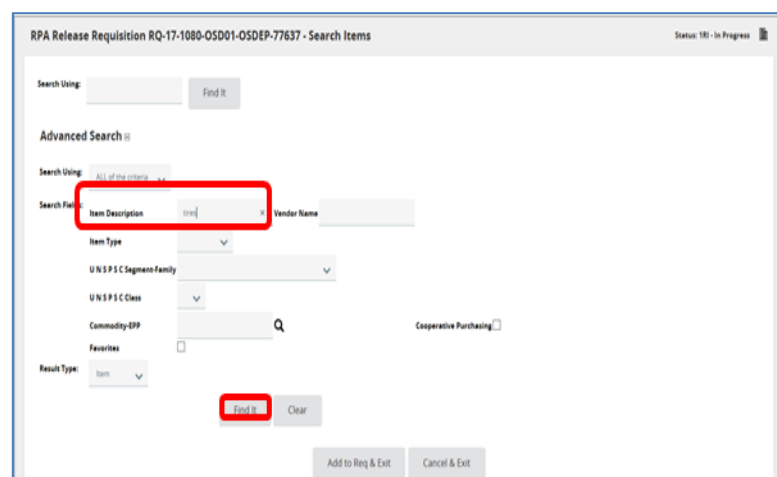
### Directions

#### Step 7: Conducting an Item Search

1. Enter the name of the item in the **Search Using** field.
2. Click on the **Find It** button.

A preferred alternate search method would be to click on the plus sign icon next to **Advanced Search**.

A popup screen allows you to search by item, vendor, and UNSPSC code.

#### Step 8 : Selecting the Item

1. Click the checkbox next to the desired item in the left **Select** column.
2. Enter the item quantity in the **Quantity** column.
3. To add other items from other pages, click on the **Add to Req & Next Page** button; otherwise click on the **Add to Req & Exit** button.

<input type="checkbox"/>	0	0	DELUXE TIRE CHANGER/Air, High Performance Tire Changer for passenger car, light truck and motorcycle wheels. Designed L...	\$11608.10	EA - Each	Snap-on Industrial, a Division of ISDC Holdings LLC	25-19 - Transportation service equipment, 17 - Vehicle servicing equipment	21.57%	PD-17-1080-1080C-1080L-7743 / 8704	Yes
<input type="checkbox"/>	0	0	2 SPD TUB/BACK TIRE CHNG, Cars and Light Trucks with OE wheels. Connector adapters for Motorcycle and ATV wheels and tire a...	\$13185.25	EA - Each	Snap-on Industrial, a Division of ISDC Holdings LLC	25-19 - Transportation service equipment, 17 - Vehicle servicing equipment	21.57%	PD-17-1080-1080C-1080L-7743 / 8705	Yes
<input type="checkbox"/>	0	0	12-PIK 320Z CLEANING SOLU. Fresh scent formula is a specially formulated multi-surface cleaner for tires, aluminum and a...	\$45.75	EA - Each	Snap-on Industrial, a Division of ISDC Holdings LLC	53-13 - Personal care products 16 - Bath and body	34.12%	PD-17-1080-1080C-1080L-7743 / 8897	Yes
<input checked="" type="checkbox"/>	3	0	BIG KONG 11 CREPPER, 13 and 1/2" wide padded creeper with 6-in. pneumatic tires. Provides a smooth ride over rough terrain.	\$331.95	EA - Each	Snap-on Industrial, a Division of ISDC Holdings LLC	26-12 - Material handling machinery and equipment 15 - Industrial trucks	34.12%	PD-17-1080-1080C-1080L-7743 / 10441	Yes
<input type="checkbox"/>	0	0	FLUID TRANSF PUMP, Transfer or siphon all types of fluids including coolant, oil, transmission fluid and water. Size 40...	\$28.50	EA - Each	Snap-on Industrial, a Division of ISDC Holdings LLC	25-17 - Transportation components and systems 17 - Braking systems and components	34.10%	PD-17-1080-1080C-1080L-7743 / 12363	Yes
<input type="checkbox"/>	0	0	3BK TUV w/WC FL ORANGE SS TOP, Larger Roll Cntr Base - KRL1023. Staircase with surface and handles. KRL1023 Series TUV an...	\$29370.00	EA - Each	Snap-on Industrial, a Division of ISDC Holdings LLC	28-11 - Containers and storage 24 - Storage chests and cabinets and trunks	45.42%	PD-17-1080-1080C-1080L-7743 / 17901	Yes

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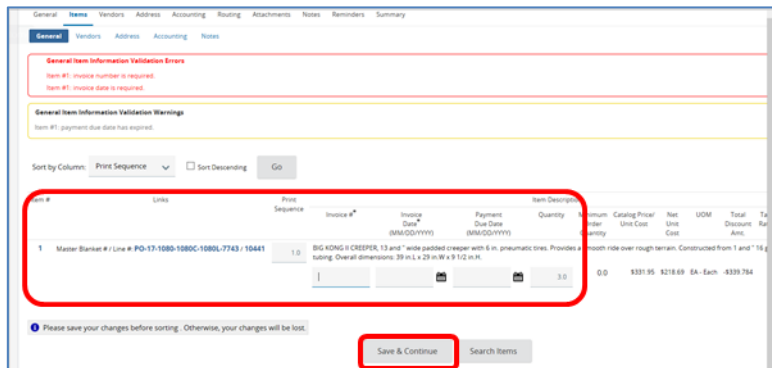
### Screenshot

### Directions

#### Step 9: Entering the Invoice Data

1. Enter the invoice number in the **Invoice #** field.
2. Enter the **Invoice Date** and **Payment Due Dates** into the respective fields.
3. Click on the **Save & Continue** button.

**NOTE:** If a selected item has a zero dollar amount, you will be prompted to enter the item amount from the invoice.



General Item Information Validation Errors

Item #1: invoice number is required.  
Item #1: invoice date is required.

General Item Information Validation Warnings

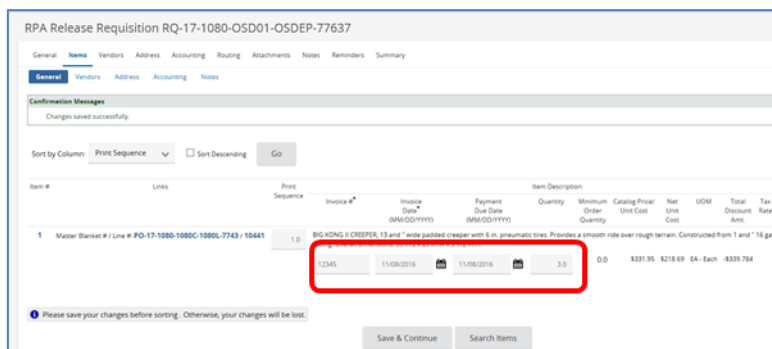
Item #1: payment due date has expired.

Sort by Columns: Print Sequence ☐ Sort Descending Go

Item #	Links	Print Sequence	Invoice #	Invoice Date (MM/DD/YYYY)	Payment Due Date (MM/DD/YYYY)	Quantity	Minimum Quantity	Catalog Price/Unit Cost	Order Unit Cost	UOM	Total Discount Amt.	Tax Rate
1	Master Blanket # / Line # PO-17-1080-1080L-7743 / 10441	1.0										

Please save your changes before sorting. Otherwise, your changes will be lost.

Save & Continue Search Items



RPA Release Requisition RQ-17-1080-OSD01-OSDEP-77637

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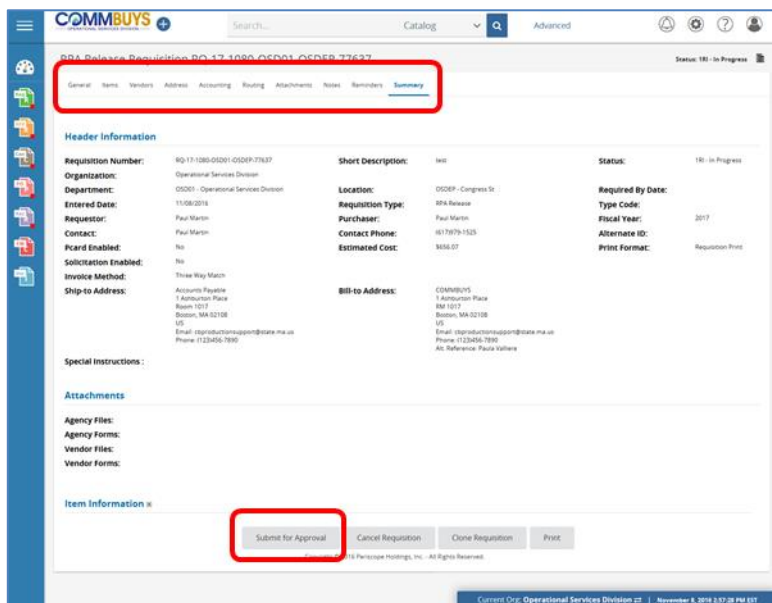
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Please save your changes before sorting. Otherwise, your changes will be lost.

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#### Step 10: Submitting for Approval

1. Verify the information contained in each tab for accuracy.
2. Click on the **Summary** tab, validate the information, then click on the **Submit for Approval** button.



COMMbuys

RPA Release Requisition RQ-17-1080-OSD01-OSDEP-77637

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Save & Continue Search Items

Header Information

Request Number: RQ-17-1080-OSD01-OSDEP-77637  
Organization: Operational Services Division  
Interested Date: 11/08/2016  
Requestor: Paul Martin  
Contact: Paul Martin  
PCard Enabled: No  
Solicitation Enabled: No  
Invoice Method: Three Way Match  
Ship to Address: Accounts Payable, 1 Amburton Place, Room 1017, Boston, MA 02108, US, Email: ap@operationalssupport@state.ma.us, Phone: (123456-7890)

Short Description: inv  
Location: OSD01 - Congress St.  
Requisition Type: RPA Release  
Purchaser: Paul Martin  
Contact Phone: (617)779-1525  
Estimated Cost: \$656.07  
Bill to Address: COMMbuys, 1 Amburton Place, RM 1017, Boston, MA 02108, US, Email: operationalssupport@state.ma.us, Phone: (123456-7890), Attn: Reference Paula Valters

Required By Date: 11/08/2016  
Type Code: 2017  
Alternate ID: Requisition Print

Special Instructions:

Attachments

Agency Files:  
Agency Forms:  
Vendor Files:  
Vendor Forms:

Item Information

Submit for Approval Cancel Requisition Clone Requisition Print

Current Org: Operational Services Division 02 | November 8, 2016 3:57:28 PM EST

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### Screenshot

### Directions

#### Step 11: Saving the Approval

The approval path is shown or you're given the option to select the appropriate one. Click the **Save & Continue** button to complete.

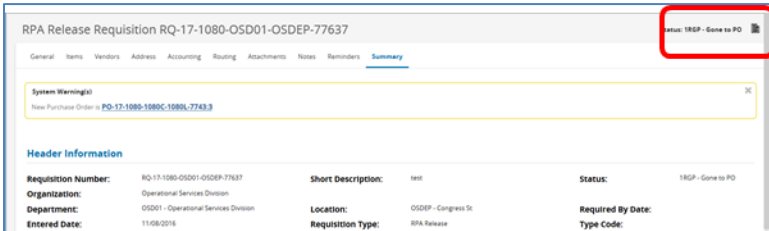
**NOTE:** The RPA Requisition will now proceed through your department's approval path (**no image is provided here as your approval path will vary**). You will be informed by COMMBUYS email when the approval is complete.

#### Step 12: Requisition has Gone to PO

After approval, the Summary tab of the RPA Requisition will have the status of **Gone to PO**.

The Summary tab of the RPA Purchase Order will have the status of **Complete Receipt**. To verify this, click on the blue hyperlink of the PO.

**NOTE:** The vendor will not see this PO.



RPA Release Requisition RQ-17-1080-OSD01-OSDEP-77637

General Items Vendors Address Accounting Routing Attachments Notes Reminders **Summary**

**System Warning(s)**

New Purchase Order in [PO-17-1080-1080C-1080C-77637](#)

**Header Information**

<b>Requisition Number:</b>	RQ-17-1080-OSD01-OSDEP-77637	<b>Short Description:</b>	test	<b>Status:</b>	18GP - Gone to PO
<b>Organization:</b>	Operational Services Division	<b>Location:</b>	OSDEP - Congress St	<b>Required By Date:</b>	
<b>Department:</b>	OSD01 - Operational Services Division	<b>Requisition Type:</b>	RPA Release	<b>Type Code:</b>	
<b>Entered Date:</b>	11/08/2016				